

Entering E-rate: Where to Begin

E-rate is a daunting process for those new to the program. Not only do they have to learn and understand the intricate rules, but they also have to jump into the E-rate process mid-funding year cycle and determine what's been done thus far, and what remains to be completed for previous and upcoming funding years. The purpose of this Guide is to assist new E-rate contacts with this process so they can be certain that no deadlines have been missed and all eligible funding has been collected.



The Guide contains five sections:

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2. Initial Questions for New E-rate Contacts – p.3
3. Upcoming Funding Year Application Steps (FY 2023: 7/1/2023 – 6/30/2024) – p.5
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Brief Program Overview

The Schools and Libraries (E-rate) Program provides discounts to eligible K-12 public and private schools and public libraries in order to obtain affordable internet access and telecommunications services. E-rate funds the following service types: Data Transmission Services and/or Internet Access (called Category 1); and Internal Connections, Managed Internal Broadband Services, and Basic Maintenance of Internal Connections (called Category 2). Discounts range from 20-90 percent of the costs of eligible services, depending on the level of poverty and the urban/rural status. In order to receive E-rate discounts, schools and libraries must competitively bid on the USAC website the eligible services for which they may be seeking discounts in the upcoming funding year, and *after* a minimum of 28 days, select the most cost-effective proposal. E-rate funding is then requested annually by applying to USAC and if discounts are approved, applicants receive discounted vendor bills, or pay the bills in full and seek reimbursement process after services have been provided. The application process begins 6-12 months in advance of the funding year.

Additional resources to learn the program basics:

- **FY 2021 PA E-rate Manual:** <http://e-ratepa.org/wp-content/uploads/2020/10/Complete-FY-2021-E-rate-Manual.pdf>. This is the most recent E-rate training manual used to train PA applicants new to the program each fall.
- **Helpful Documents:** Guidance related to each step of the application is process can be found on the [PA E-rate website](http://e-ratepa.org) under Helpful Documents at: http://e-ratepa.org/?page_id=754.
- **Application Process Flowchart – New Contracts:** <http://e-ratepa.org/wp-content/uploads/2020/10/2-2-Arrows-Flow-Chart-New-Contract-2021.pdf>

- **Application Process Flowchart – Existing Contracts:** <http://e-ratepa.org/wp-content/uploads/2020/10/2-2-1-Arrows-Flow-Chart-Existing-Contract-2021.pdf>
- **FY 2023 Timeline:** <http://e-ratepa.org/wp-content/uploads/2014/03/E-rate-Timeline-FY-2023.pdf>
- **USAC Program Description:** <https://www.usac.org/wp-content/uploads/e-rate/documents/Handouts/E-rate-Overview.pdf>
- **USAC Learning Library:** <https://www.usac.org/e-rate/learn/>

In addition to reviewing these resources and websites, new E-rate contacts are strongly encouraged to attend E-rate beginners' trainings that are held each fall, review previous training materials (see http://e-ratepa.org/?page_id=745), and watch USAC's self-paced tutorials and videos at <https://www.usac.org/e-rate/trainings/>.

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Initial Questions for New E-rate Contacts

When coming into the program anew, E-rate contacts should first review these five questions and take the appropriate action where needed.



1) Are you a “User” in your school or library’s EPC account?

One Portal is the umbrella system that contains the EPC Portal (the E-rate

E-rate Productivity Center (EPC) - E-rate Program participants use the E-rate Productivity Center to manage program processes, receive notifications and to contact customer service.

FCC Form 472 (BEAR) - Applicants file an FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form) to request reimbursement from USAC for the discount amount of the eligible products or services that the applicant has received and paid for in full.

Emergency Connectivity Fund (ECF) - Emergency Connectivity Fund participants use the ECF Portal to submit applications and review notifications regarding their program activities. Using this link, schools and libraries can also access the FCC Form 472 (BEAR) and service providers can access the FCC Form 474 (SPI) to request ECF reimbursement.

Productivity Center), the E-rate Form 472 BEAR Reimbursement System, and the Emergency Connectivity Fund (ECF) application system. The EPC Portal is the central portal where all E-rate applications are filed and processes/correspondence are completed. Each organization has an EPC Account, and each EPC Account has an EPC Account Administrator (AA) and EPC Users. If you are new to E-rate or to an organization, it is likely that you do not have an EPC User Account set up for your entity’s EPC portal (EPC Accounts are not transferable between organizations).

There are two ways to establish your EPC User Account:

- Via Your Organization’s EPC Account Administrator:
 - Your school or library’s EPC Account Administrator (AA) should log into EPC and click on “Manage Users” in the top right corner of their EPC Landing Page, then “Create New User,” and complete the required fields. The new User will then receive an e-mail message from the EPC system with instructions to create their password and log into EPC. After inside the EPC portal, the new User will click on “Tasks” in the upper toolbar, select the pending Task, and then accept the EPC Terms and Conditions.
- Via USAC’s Customer Service Center (CSC):
 - If your school or library’s EPC Account Administrator is no longer with the organization, or if you’re unsure who your EPC AA is, contact USAC at 888-203-8100 and they will assist you with becoming an EPC User and establishing a new Account Administrator for your organization, if needed.

2) Have you established your One Portal multi-factor authentication (MFA) validation choices?

One Portal is USAC’s umbrella sign-in system that requires all users to use multi-factor authentication (MFA) before they gain access to the EPC and BEAR Reimbursement Systems. The One-Portal/MFA set up process requires several steps and I encourage you to review the One Portal/MFA Set Up Guide at <http://e-ratepa.org/wp-content/uploads/2020/07/One-Portal-MFA-Set-Up-Guide.pdf> to walk through the process. The initial MFA authentication defaults to your e-mail address; be sure to add text message MFA authentication as shown in the Guide.

- Technical Hints: Before you begin:
 - ✓ Be sure to use a Chrome or Firefox browser

- ✓ Disable all privacy features (such as EFF Privacy Badger)

If you experience problems setting up your One Portal account, call USAC's CSC at 888-203-8100.

3) Do you have Access to the BEAR Reimbursement System?

If an applicant pays vendor invoices in full, they must seek reimbursement from USAC using the Form 472 BEAR Form which is currently within the One Portal system but not in EPC. The Form 472 BEAR Form system does not require a separate password, but you must receive "access" from USAC to file this form. To know if USAC has provided such access, look at the Dashboard when you log into One Portal. If it doesn't show the FCC Form 472 (BEAR) option as shown here, you do not yet have access (which is most likely if you are a new EPC User). To request such access, complete a BEAR access template available here: <https://www.usac.org/wp-content/uploads/e-rate/documents/Forms/BEAR-Access-Template.xlsx>, then create a customer service case in EPC and explain that you need to be able to access the BEAR filing platform.

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Emergency Connectivity Fund (ECF) - Emergency Connectivity Fund participants use the ECF Portal to submit applications and review notifications regarding their program activities. Using this link, schools and libraries can also access the FCC Form 472 (BEAR) and service providers can access the FCC Form 474 (SPI) to request ECF reimbursement.

4) Are you subscribed to the PA E-rate Listserve?

The PA E-rate Coordinator maintains a one-way listserv that is used to disseminate regular updates about program changes, deadlines, funding commitments, training events, training guides and helpful reminders. If you are not currently receiving these regular E-rate updates from Julie Tritt Schell, the PA E-rate Coordinator, please e-mail her at jtschell@comcast.net and ask to be added to the list. All previous listserv messages (since the beginning of the program) are posted at: http://e-ratepa.org/?page_id=7751.

5) Are you subscribed to the USAC News Brief?

USAC emails monthly and as-needed News Brief to applicants. If you are not currently receiving the USAC News Briefs, go to: <https://www.usac.org/e-rate/resources/news-brief/> to subscribe.

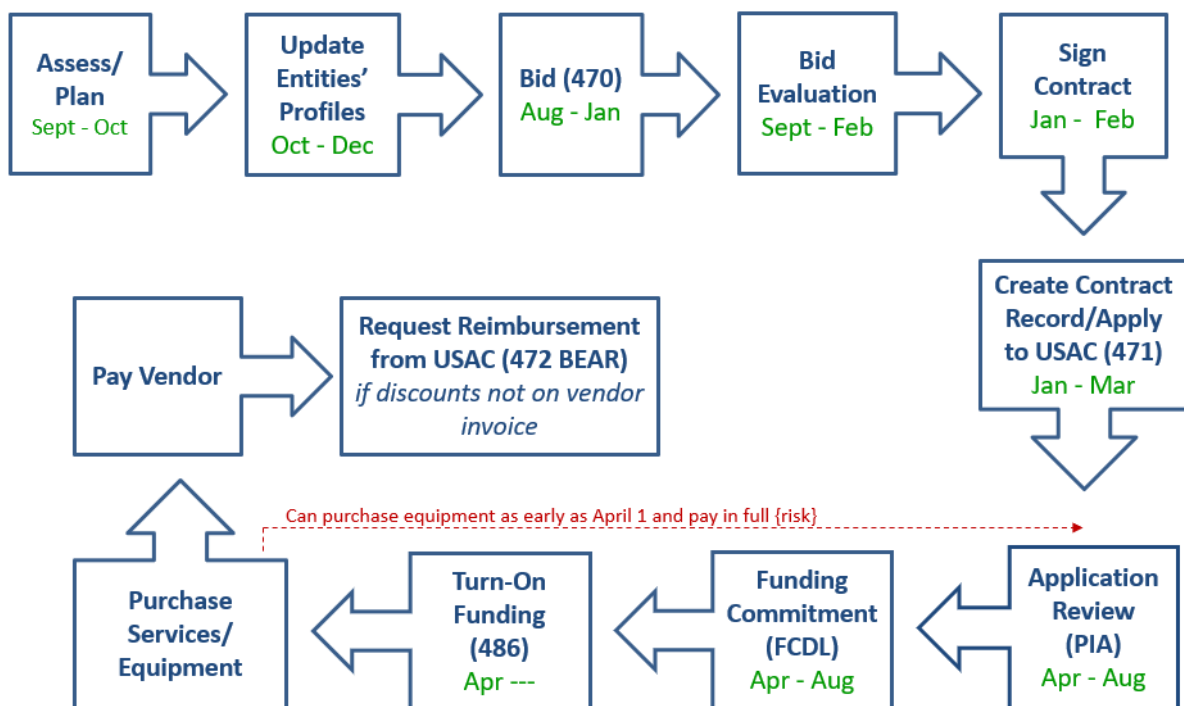
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Upcoming Funding Year: FY 2023

The E-rate application process begins 6-12 months prior to the beginning of the next funding year and contains multiple deadlines that must be met during the application process. Funding Year 2023 begins July 1, 2023; therefore, the application process begins in July 2022. Guidance related to each step of the application process can be found on the [PA E-rate website](http://e-ratepa.org) under Helpful Documents at: http://e-ratepa.org/?page_id=754.



The following are the key steps to the E-rate application process that align with this flowchart, organized by the month(s) during which that step of the process occurs. Based on when a new E-rate contact enters their role, they should be able to understand what is due during that period and determine if that required step/form has been completed.



October 2022 – Early January 2023:

- During the annual “**Admin Window**,” schools enter enrollment and NSLP eligibility data in each school’s EPC profile and add or remove entities if needed. Libraries will update square footage data if there are changes. The data inputted into school profiles is what the EPC system uses to calculate school district, library and consortia discount rates. The Admin Window is typically open from about October 1 – January 10 and PDE traditionally releases draft enrollment/NSLP data around December 15 that schools can use to populate their EPC profiles.
 - If you’re unsure whether this information has been updated for your school/library during the Admin Window, you can review the data on the Form 471 and if it has not been updated,

submit a RAL Correction immediately after the Form 471 is submitted to request that the data be modified during PIA review.

- To update enrollment and NSLP data during the Admin Window:
 - > EPC Landing Page > District Name > Discount Rate > Show Entities > Right click on each school's name and select "Open link in new tab" > Click Manage Organization on each tab > Enter enrollment/NSLP data > Submit > Repeat for each tab (school).
- Calculate your available **Category 2 budget** for the upcoming funding year.

Depending on your entity type and size, there are different options to calculating your available Category 2 budget as follows:

Schools:

- School District with 11 or more schools: Greater of these two options: 1) district enrollment X \$167, OR 2) Number of schools X \$25,000.
- School Districts with 10 or fewer schools (USAC calls these 'child entities') have a third "hybrid" option. The hybrid method allows these smaller entities to calculate their C2 budgets on a per-school basis using the greater of either the \$25,000 funding floor and the budget multiplier, then adding up each school's individual budgets to obtain the district-wide C2 budget. (Hint: a school with fewer than 150 students would want to use the \$25,000 funding floor for that school instead of the \$167/student.)
- Single School: School enrollment X \$167, OR \$25,000, whichever is greater.

Libraries:

- Library Systems with 10 or fewer libraries (USAC calls these 'child entities') have a third "hybrid" option. The hybrid method allows these smaller entities to calculate their C2 budgets on a per library basis using the greater of either the \$25,000 funding floor and the budget multiplier, then adding up each library's individual building budgets to obtain the system wide C2 budget. (Hint: a library branch with less than 5,556 square feet would want to use the \$25,000 funding floor instead of the \$4.50/sq ft.)
- Library System with 11 or more libraries: Greater of these two options: 1) total square footage of the library branches in the library system X \$4.50, OR 2) # of library branches in the library system X \$25,000.
- Single Library: Square footage X \$4.50, OR \$25,000, whichever is greater.

USAC's Category 2 budget tool calculates the total amount of C2 funding currently available, using the most advantageous budget calculation option for each entity type. In addition, the tool tracks each entity's remaining C2 budget, including amounts pending and committed from previous funding years. The tool is available in USAC's Open Data platform: <https://opendata.usac.org/E-rate/E-rate-C2-Budget-Tool-FY2021-/8z69-hkn7>. To see specific data, use the simple Filters on the right toolbar

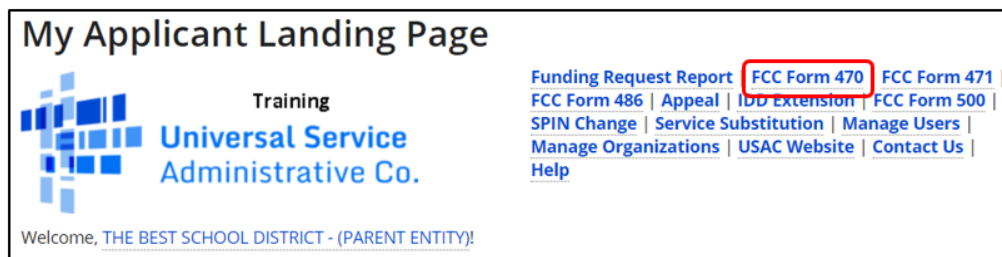
(be sure to click 'Apply' after selecting your filter). Then click 'Export' to download the results into Excel.

July 2022 (Typically Fall) – January 2023:

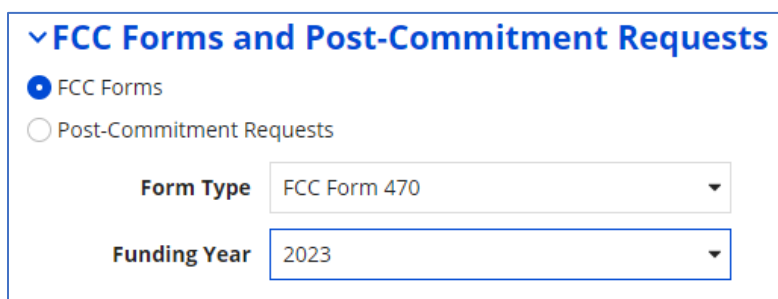
- File **Form 470** to competitively bid equipment and services for which a new contract is required. To determine if a new contract is required, review the existing contract to determine if the contract is expiring and/or if any contract extensions are included.
 - If the contract is expiring before the end of the upcoming funding year (June 30, 2024), a new Form 470 is required.
 - A Form 470 also is required to be filed annually for services provided on a month-to-month (MTM) basis.

Note: A Form 470 is not required in the remaining years of a multi-year contract, or when an applicant is purchasing the Commercially-Available Business-Class Internet Option (**CABIO**) that costs no more than \$300/month (including taxes, fees, equipment) and is for a downstream speed of at least 100 Mbps per building and 10 Mbps upstream (such as a DSL or Cable Internet service) per building.

- To submit a new Form 470, select "FCC Form 470" at the top right corner of your EPC Landing Page.



- If you're unsure whether a Form 470 has been submitted yet, scroll to the bottom of your EPC Landing Page under "FCC Forms and Post-Commitment Requests" and select the Form Type and Funding Year. There you will see whether any Form 470s have been filed for your organization. If no results are returned, this means there have been no Form 470s filed for that year.

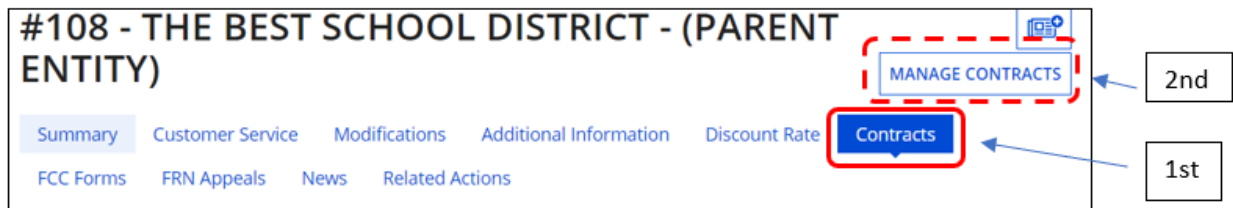
A screenshot of a filter section titled "FCC Forms and Post-Commitment Requests". It has two radio buttons: "FCC Forms" (selected) and "Post-Commitment Requests". Below the radio buttons are two dropdown menus: "Form Type" with "FCC Form 470" selected, and "Funding Year" with "2023" selected.

January 2023 – February 2023:

- During the bidding period, vendors review Form 470 postings and submit proposals directly to applicants as prescribed in the Form 470 or RFP.
- After a minimum 28-day bidding period, applicants then conduct a **bid evaluation** (no earlier than the 29th day after the Form 470 was posted) using price of eligible equipment/services as the most heavily weighted factor.
- Applicants then negotiate and sign contracts with awarded vendors. If local policies require, applicants must obtain board approval prior to signing the contract.
 - Unless using a MTM Category 1 service, contracts must be signed prior to filing the Form 471.
 - Only the applicant must sign/date the contract prior to filing the Form 471.

January 2023 – March 2023:

- Create **Contract Record(s)** in the EPC Contract Module for each newly signed contract. Contract Records are used to upload a newly signed contract, identify associated Form 470 number, winning vendor, # of bids received, contract signing date, and contract extensions, if any.
 - To create new Contract Records or view CRs that have been previously created, click on the name of your school/library on the EPC Landing Page (just below the USAC logo in the top left corner of the page), select “Contracts” from the top toolbar, and then “Manage Contracts.”



- File **Form 471** by deadline (typically mid-late March) to formally request E-rate funding from USAC. Category 1 and Category 2 requests must be filed on separate applications, but multiple Funding Requests (FRNs) can be submitted on each application, as needed. The Form 471 imports discount calculation data from the entity’s EPC profiles, and each FRN will be linked to a Contract Record unless the service is being provided on a month-to-month (MTM) basis. The form also requires applicants to identify the specific services or equipment being requested, costs per circuit or per unit, quantity, and recipients of service.
 - To submit a new Form 471, select “FCC Form 471” at the top right corner of your EPC Landing Page.

My Applicant Landing Page



Training
Universal Service Administrative Co.

Welcome, THE BEST SCHOOL DISTRICT - (PARENT ENTITY)!

[Funding Request Report](#) |
 [FCC Form 470](#) |
 [FCC Form 471](#) |
 [FCC Form 486](#) |
 [Appeal](#) |
 [IDD Extension](#) |
 [FCC Form 500](#) |
 [SPIN Change](#) |
 [Service Substitution](#) |
 [Manage Users](#) |
 [Manage Organizations](#) |
 [USAC Website](#) |
 [Contact Us](#) |
 [Help](#)

February 2023 – FCDL Date:

- After the Form 471 is submitted, it will undergo **Program Integrity Assurance (PIA)** review where the PIA team will review every line of every application to check for accurate discounts, eligible services, compliant bidding, and cost effectiveness. If PIA reviewers have questions, they will post the questions in EPC, and e-mail the Form 471 contact, providing a link to their questions. Applicants have 15 days to respond. Failure to respond may result in denial of funding.
 - If you're unsure whether any PIA inquiries are pending for your applications, click on "Pending Inquiries" at the top of your EPC Landing Page, or call USAC at 888-203-8100.

Pending Inquiries

Type

Application/Request

Funding Year

Late April 2023 – September 2023:

- USAC issues weekly funding "waves" containing **Funding Commitment Decision Letters (FCDLs)** that explains whether the FRN(s) was approved, reduced, denied or cancelled. The FCDL is posted in the organization's EPC portal, and the Form 471 contact receives an e-mail with a link to the posted FCDL. USAC's goal is to have all FCDLs issued by September 1.
 - If you're unsure if any FCDLs have been issued, search under "Notifications" on your EPC Landing Page.

Notifications

Notification Type

Funding Year

- Applicants have 60 days from the FCDL date to **appeal** to USAC if they disagree with a funding decision. If USAC denies the appeal, applicants have 60 days from the appeal decision letter to appeal to the FCC.
 - Appeals to USAC are submitted by selecting “Appeal” at the top right corner of your EPC Landing Page.



- Appeals to the FCC are submitted in the ECFS Filing System <https://www.fcc.gov/ecfs/>, listing Proceeding **02-6**.

FCDL Date – October 28, 2024:

- Within 120 days of the FCDL date, or service start date (whichever is later), applicant must file **Form 486** in EPC. The Form 486 certifies their organization’s compliance with the Children’s Internet Protection Act (CIPA) and authorizes USAC to pay invoices that are submitted because services have begun or will begin.
 - To submit a new Form 471, select “FCC Form 486” at the top right corner of your EPC Landing Page.



- If you’re unsure whether a Form 486 has been submitted, scroll to the bottom of your EPC Landing Page under “FCC Forms and Post-commitment Requests” and select the Form Type and Funding Year.

▼ **FCC Forms and Post-Commitment Requests**

FCC Forms

Post-Commitment Requests

Form Type

Funding Year

April 1, 2023 – September 30, 2024:

- Applicants may **purchase/install** Category 2 equipment as early as April 1 prior to the funding year if they choose to pay for the equipment in-full, and with the risk of not receiving the E-rate funding commitment requested. However, E-rate funding cannot be reimbursed from USAC until at least July 1, or Form 486 certification date, whichever is later. Deadline to purchase/install Category 2 equipment is September 30, three months after the close of the funding year. This provides applicants with a full 18 months to purchase/install equipment instead of the 12-month funding year for recurring services. All equipment must be installed by September 30, even if installation is not being paid with E-rate funding.
- Applicants must label all E-rate funded equipment and maintain a Fixed Asset Register (FAR), (also known as an Asset Inventory) that provides details of all equipment including: make & model, serial number (if available), physical location of equipment (building/room number), date installed, funding year, FRN number, PO number, and related payment information. A sample FAR is available at: <http://e-ratepa.org/wp-content/uploads/2014/03/Asset-Register-Sample.xlsx>.

July 1, 2023 – October 28, 2024:

- Applicants that have paid the full cost of the vendor invoice may seek **reimbursement** from USAC using the Form **472 BEAR**. Likewise, vendors that have provided the applicant with discounted bills may seek reimbursement from USAC using the Form 474 SPI.
- Deadline to submit reimbursement forms for recurring services (generally Category 1 services and Category 2 basic maintenance) is October 28, 2024 (4 months after the funding year has ended which is June 30, 2024). Deadline to submit reimbursement forms for non-recurring items (generally Category 2 equipment/licenses) is January 28, 2025 (4 months after the last date to purchase/install equipment which is September 30, 2024). Applicants may request a single, 4-month reimbursement extension, but the extension request must be submitted by the original reimbursement deadline.
 - If you're unsure whether a BEAR or SPI has been paid, refer to Step 6 below.
 - To submit a new BEAR, or search for copies of previously submitted BEARs, log in to One Portal and then click on FCC Form 472 (BEAR) on the One Portal Dashboard. Then enter your organization's Billed Entity Number to enter the Form 472 BEAR System.

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Applicant Login:

BEN:

Email:

If you don't see the FCC Form 472 (BEAR) Option, refer to page 4, item 3 of this Guide for steps on obtaining BEAR access for your organization.

E-rate Funding Year 2023 - Dates to Remember

	APPLICATION PROCESS				RECURRING SERVICES		NON-RECURRING EQUIPMENT/SERVICES	
	Admin Window EPC Profile Updates 	Form 470 Competitive Bidding 	Form 471 Application Window to Request Discounts 	Form 486 Service Start Date + CIPA Certification 	Delivery Dates (Category 1 or 2) 	Form 472 BEAR Invoicing Deadline 	Purchase/Installation Dates 	Form 472 BEAR Invoicing Deadline 
FY 2023	Oct. 2022 – early Jan 2023	July 1, 2022 – Feb. 22, 2023 (29-days before 471 deadline)	Generally early Jan – mid March	120 days from: FCDL or Service Start Date (whichever is later)	July 1, 2023 to June 30, 2024	Oct. 28, 2024	April 1, 2023 to Sept. 20, 2024	Jan. 28, 2025
Notes	Update enrollment/NSLP (CEP%) data and C2 budget data in EPC	Don't bid if in an existing, E-rate-valid, multi-year contract that expires on or after June 2024	A 471 must be filed every year to receive \$\$, even if under multi-year contract	FCDL = Funding Commitment Decision Letter	Broadband, Internet, & maintenance services are considered 'Recurring'	May request a single 120-day extension if submitted by BEAR deadline	Equipment purchases, installation costs are considered 'Non-Recurring'	May request a single 120-day extension if submitted by BEAR deadline

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Current Funding Year: FY 2022

The “current” funding year would be considered the funding year for which you are currently receiving services, as opposed to the upcoming funding year for which you are applying. Funding Year 2022 is from July 1, 2022 – June 30, 2023. The steps below will help a new E-rate contact determine what has previously been submitted by their school or library and what steps remain to be completed in order to successfully obtain E-rate funding.



1) Determine if your school/library submitted any applications for FY 2022.

First, download a spreadsheet showing your organization’s FY 2022 funding requests using the “FRN Status Tool” at <https://data.usac.org/publicreports/FRN/Status/FundYear>.

- Change Funding Year to FY 2022.
- Enter your school/library’s BEN (Billed Entity Number). If you don’t know your BEN, you can search for it at: https://sl.universalservice.org/Utilities/BilledEntitySearch_Public.asp.

Step 1 : Please enter the search criteria

I. Required Criteria

Funding Year	<input type="text" value="2022"/>
Please enter one or more of the following:	
State	<input type="text" value="SELECT"/>
BEN	<input type="text" value="125300"/>
CRN	<input type="text"/>
SPIN (Go to SPIN Search):	<input type="text"/>

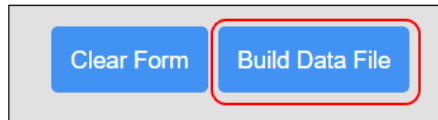
- Then scroll down and click “Select Data Points” and then “Select All Data Points.”

Select Data Points

Step 2. Please select the datapoints you would like to include in your datafile:

Select All Data Points

- Then scroll to the bottom of the page and click “Build Data File.”



A spreadsheet will open showing all Funding Requests submitted by your school/library for that funding year. If the spreadsheet is empty, it means no applications were submitted in that funding year and you can ignore the remaining steps.

To see a synopsis of all funding requested/disbursed since 1998, go to: <https://tools.e-ratecentral.com/us/stateInformation.asp?state=PA> and enter your school or library's Billed Entity Number (BEN) under 'Funding Quick Search' on the left side of the page. On the results page, click on each funding year to drill down into the FRNs.

A screenshot of a web form titled 'Funding Quick Search'. It features two radio buttons: 'Billed Entity Number' (selected) and 'SPIN'. Below the radio buttons is a text input field containing the number '125300'. At the bottom of the form is a 'Search' button.

To see copies of the actual forms, appeals and other post-commitment requests that were submitted since FY 2016, scroll to the bottom of your EPC Landing Page, and select the relevant form and funding year.

A screenshot of a web interface section titled 'FCC Forms and Post-Commitment Requests'. It has a dropdown arrow on the left. Below the title are two radio buttons: 'FCC Forms' (selected) and 'Post-Commitment Requests'. There are two dropdown menus: 'Form Type' with 'FCC Form 471' selected, and 'Funding Year' with '2022' selected.

2) If applications were submitted, determine how many Funding Requests were submitted and the FRN Review Status of each Funding Request.

Each row represents a separate Funding Request, called an FRN, that was submitted for that funding year. Each FRN has a unique number that begins with the funding year (FY 2022 have FRNs that begin 22xx).

- Review Column C to see if the FRN(s) were Funded, Denied, Cancelled, or Pending.
 - If an FRN's status is 'Pending,' contact USAC at 888-203-8100 and explain that you are new to your organization and ask if there are any open PIA inquiries for the Pending FRN (the FRN number is listed in Column A).

A	B	C	D
FRN	FRN Nickname	FRN Status	471 Application Number
2299008026	Switches - Cisco - ePlus	Funded	221007258
2299008030	Wireless - Aruba - Integra1	Funded	221007258
2299012263	WAN MRC - Crown Castle - Dark Fiber	Funded	221010390
2299012428	Internet - Chesconet	Funded	221010390

- For Funded FRNs, continue with the next steps.

3) Review the following columns to understand the key information of each funding request:

- Column AF will show the vendor’s name. Column AG will show the vendor’s SPIN number.
- Column AK will show the date the school/library signed the contract with the vendor. If blank, it means the applicant indicated it was a month-to-month service for which no contract was signed.
- Column AJ will show whether a Form 486 has been submitted.
- Column AL will show the date that the school/library reported that the contract will expire, and Column AM will show whether the school/library reported whether any extensions were included on the contract. (Note: the system does not adjust downward the extension numbers from year to year when an extension is used.)
- Column AN will show the deadline to submit a reimbursement form to USAC.

AF	AG	AH	AI	AJ	AK	AL	AM	AN
Service Provider Name	SPIN	SPAC Filed	Fund Year	486 Service Start Date	Contract Award Date	Contract Exp or Svc End Date	g Contract Extension s	Last Date to Invoice
ePlus Technology, Inc.	143006553	Yes	2022	7/1/2022	1/27/2022	9/30/2023		1/29/2024
Integra Business Center Inc.	143004753	Yes	2022	7/1/2022	1/27/2022	9/30/2023		1/29/2024
Crown Castle Fiber LLC	143005274	Yes	2022	7/1/2022	2/4/2022	6/30/2024	5	10/30/2023
Chester County Community Net. I	143004423	Yes	2022	7/1/2022	2/3/2021	6/30/2023	2	10/30/2023

- Column BH will show the approved discount rate.
- Column BF will show the approved pre-discount amount, and Column BJ will show the approved discounted (committed) amount.
- Column BL will show the Service Category (Data Transmission/Internet, Internal Connections, Basic Maintenance of MIBS)

BE	BF	BG	BH	BI	BJ	BK	BL
Orig Total Cost	Cmtd Total Cost	Orig Discou	Cmtd Discou	Orig Funding Request	Cmtd Funding Request	Orig FRN Service Type	Cmtd FRN Service Type
\$75,158.00	\$75,158.00	50%	50%	\$37,579.00	\$37,579.00	Internal Connection:	Internal Connections
\$59,679.00	\$59,679.00	50%	50%	\$29,839.50	\$29,839.50	Internal Connection:	Internal Connections
\$31,578.96	\$31,578.96	50%	50%	\$15,789.48	\$15,789.48	Data Transmission at	Data Transmission and/or In
\$36,000.00	\$36,000.00	50%	50%	\$18,000.00	\$18,000.00	Data Transmission at	Data Transmission and/or In

4) Determine if a Form 486 was filed for each FRN.

- Assuming the FRN(s) was Funded, review Column AJ to determine if a Form 486 was submitted. If the cell is blank, file the Form 486 in EPC as soon as possible. If the Form 486 is being submitted after October 28, 2021 (or more than 120 days after the FCDL date showing in Column BP), file the Form 486, then contact Julie Tritt Schell, the PA E-rate Coordinator, at jtschell@comcast.net for instructions on submitting an appeal to USAC to request that funding be restored.

AJ
486 Service Start Dat
7/1/2022
7/1/2022
7/1/2022
7/1/2022

5) Determine if the vendor filed their Form 473 Service Provider Annual Certification (SPAC) for the current Funding Year.

- Review Column AH "SPAC Filed?" If the cell is marked Yes, do nothing. If the cell is marked No, contact that vendor ASAP and tell them they must file their Vendor Form 473 Service Provider Annual Certification Form immediately for this funding year. Without this column showing Yes, USAC will not approve your reimbursement request.

AH
SPAC Filed
Yes
Yes
Yes
Yes

6) Determine if any funding remains to be reimbursed.

- Review Columns BX, BY and BZ. Column BX shows the total E-rate funding committed for the funding request. Column BZ will show the total amount of reimbursement that has been disbursed by USAC to date and Column BY will show if the reimbursement form was submitted by the vendor (SPI) or the applicant (BEAR).

BX	BY	BZ
FRN		Total
Committed	Invoicing	Authorized
Amount ▼	Mode ▼	Disburseme ▼
\$37,579.00	NOT SET	
\$29,839.50	SPI	\$2,186.50
\$15,789.48	NOT SET	
\$18,000.00	SPI	\$4,500.00

- If Column BY shows “Not Set” it means that neither an applicant Form 472 BEAR or vendor Form 474 SPI has been submitted to USAC seeking reimbursement. If the status is Not Set, the applicant should review their vendor service/equipment invoices to determine if the vendor provided discounted bills or whether the applicant paid the in full.
- If Column BZ shows \$0.00, it means that a BEAR or SPI was submitted to USAC and likely has been \$0-funded (denied). If Column BY indicates a BEAR was submitted and has been \$0-funded, the applicant should contact USAC at 888-203-8100 to request details pertaining to the BEAR and exactly why it was denied. As long as the reimbursement deadline has not passed, the applicant should submit a new, corrected BEAR (there is no way to amend an existing BEAR).
- Applicants that have paid the full cost of the vendor invoice may seek **reimbursement** from USAC using the Form **472 BEAR** (in the legacy system, not in EPC). Likewise, vendors that have provided the applicant with discounted bills may seek reimbursement from USAC using the Form 474 SPI.
 - Deadline to submit reimbursement forms for recurring services (generally Category 1 services and Category 2 basic maintenance) for FY 2022 is October 28, 2023 (4 months after the funding year has ended which is June 30, 2023).
 - Deadline to submit reimbursement forms for non-recurring items (generally Category 2 equipment/licenses) is January 28, 2024 (4 months after the last date to purchase/install equipment which is September 30, 2023).
 - Applicants and/or vendors may request 1, 4-month reimbursement extension, but the extension request must be submitted by the original reimbursement deadline.
 - The exact invoicing deadline for each FRN can be found in Column AN.
- To submit a new BEAR or search for copies of previously submitted BEARs, follow the steps outlined on page 11 of this guide.

AN
Last Date to Invoice ▼
1/29/2024
1/29/2024
10/30/2023
10/30/2023

After all of these steps have been completed, and related documents have been archived at the school/library where they must be retained for a period of 10 years following the last date to receive service in a funding year, FY 2022 can be considered “complete.”

* * *

Previous Funding Year: FY 2021

The “previous” funding year would be considered the funding year which ended June 30, 2022 (September 30, 2022 for non-recurring purchases such as equipment).

Typically, after a funding year has ended, the only steps remaining are to:

1. Determine if vendor invoices were discounted, and if not, be certain that the Form 472 BEAR reimbursement forms have been submitted to USAC by the required deadlines; and
2. Archive all relevant documents related to the procurements, discounts, services and equipment received, asset registers, CIPA, and vendor invoicing for the funding year.



The steps required for determining whether funds have been committed and disbursed for the prior funding year are the same steps outlined above for the ‘Current’ Funding Year, except that applicants would download a spreadsheet showing your organization’s **FY 2021** funding requests instead of FY 2022. The spreadsheet can be downloaded using the “FRN Status Tool” at

<https://data.usac.org/publicreports/FRN/Status/FundYear>.

- Change Funding Year to FY 2021.
- Enter your school/library’s BEN (Billed Entity Number). If you don’t know your BEN, you can search for it at: https://sl.universalservice.org/Utilities/BilledEntitySearch_Public.asp.

Step 1 : Please enter the search criteria

I. Required Criteria

Funding Year	<input type="text" value="2021"/>
Please enter one or more of the following:	
State	<input type="text" value="SELECT"/>
BEN	<input type="text" value="125300"/>

- Follow the remaining steps, beginning on Page 11 of this Guide.

FY 2021 Reimbursement Deadlines

- The deadline to submit reimbursement forms for recurring services (generally Category 1 services and Category 2 basic maintenance) for FY 2021 is October 28, 2022 (4 months after the funding year has ended which is June 30, 2022).
- Deadline to submit reimbursement forms for non-recurring items (generally Category 2 equipment/licenses) for FY 2021 is January 28, 2023 (4 months after the last date to purchase/install equipment which is September 30, 2022).

- Applicants are permitted to request 1, 4-month reimbursement extension, and the extension request is required to be submitted by the original reimbursement deadline. To determine the exact deadline for each FRN, refer to Column AN.
- To submit a new BEAR or search for copies of previously submitted BEARs, follow the steps outlined on page 11 of this guide.

After all discounts/reimbursements have been received, and all related documents have been archived at the school/library where they must be retained for a period of 10 years following the last date to receive service in a funding year, FY 2021 can be considered “complete.”

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